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ABSTRACT

The National Association of Broadcasters conducted a mail survey of local commercial television stations to determine the levels of commercials and non-program material run in programs produced for children under the age of 12. A random selected composite week from the 1986-87 television season was used and 267 stations from a random sample responded for a 57.4% response rate. The survey yielded over 5,600 programs covering more than 3,000 "clock hours" of air time. The results of the survey showed that the average children's program contained slightly more than 8.5 minutes of commercial time on a per-hour basis; total non-program material time was just over 13 minutes per hour; and commercialization levels in non-network programs appear to vary by market size. It was also found that over two-thirds of all programs have fewer than 10 minutes per hour of commercials, and nearly 9 out of 10 programs have fewer than 12 minutes of commercials on a per hour basis. A complete copy of the survey is provided, and the data from the survey is summarized in eight tables. (Author/EW)

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CHILDREN'S TELEVISION COMMERCIALIZATION SURVEY

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NAB BROADCASTERS

National Association of Broadcasters • 1771 N Street, N.W. • Washington, D.C. 20036-2898

NAB Children's Television Commercialization Survey

NAB Research and Planning Department

February, 1988

Edward E. Cohen
National Association of Broadcasters
Research and Planning Department

NAB Children's Television Commercialization Survey

February, 1988

Executive Summary

The National Association of Broadcasters conducted a mail survey of local commercial television stations to determine the levels of commercials and non-program material run in programs produced primarily for children under the age of 12. A randomly selected composite week from the 1986-87 television season was used and 267 stations from a random sample responded for a 57.4 percent response rate. The survey yielded over 5,600 programs covering more than 3,000 "clock hours" of air time.

The results of the survey showed that the average children's program contained slightly more than 8-1/2 minutes of commercial time on a per-hour basis. Total non-program material time was just over thirteen minutes per hour. Commercialization levels in non-network programs appear to vary by market size. It was also found that over two-thirds of all programs have fewer than ten minutes per hour of commercials and nearly nine out of ten programs have fewer than twelve minutes of commercials on a per hour basis.

NAB Children's Television Commercialization Survey

February, 1988

Method

This survey of children's television commercialization levels was conducted by the National Association of Broadcasters from mid-December, 1987 through early February, 1988. A random sample of 469 commercial television stations was selected and given the dates for a randomly selected composite week for the 1986-87 television season. Potential respondents were asked to list all children's programming (i.e. programs produced primarily for an audience aged 12 and under) that aired on their station during the seven days along with the source of the programming (syndicated, barter, local, network, or other), the time the programs aired, and the amount of commercial matter, promotional announcements, public service announcements, and other non-program material in minutes and seconds that aired in each program. Respondents were asked to use the "clock hour" rather than including only non-program material aired within the program. In this way, all adjacencies to programs were included (e.g. if a program began at 4:00 p.m. and ended at 4:29 p.m., stations were asked to list at non-program material through 4:30 p.m.). ABC, CBS, and NBC provided NAB with the amounts and types of non-program material included in network programs. Descriptions of the programs were also requested in case it was necessary to determine if any programs were actually "true" children's programming. Copeis of the questionnaire and forms are attached.

The survey was conducted by mail using three mailings. Mailgrams informing the potential respondents of the study and its importance were sent prior to the first mailing. Another mailgram was sent prior to the third mailing. All correspondence

was addressed to the general manager of each station. Of the 469 stations, 267 responded, 1 refused, and 4 reported that they were not on the air during that period. The response rate was 57.4 percent. Sampling error for binary questions involving the entire sample was approximately 4.5 percent at the 95% confidence level, using the finite population correction factor.

Of the responding stations, 178 or 66.7 percent were affiliates and 89 or 33.3 percent were independents, a ratio that is relatively close to the universe. Of the affiliates, 55 were primary ABC stations, 68 were primary CBS stations, and 55 were primary NBC affiliates. By market size, 28 stations were in top ten markets, 24 in markets 11 through 20, 20 in markets 21-30, 15 in markets 31 through 40, 19 in markets 41-50, 80 in markets 51-100, and 83 in markets smaller than 100.

Results

The survey covered 5,635 different children's television programs or an average of over 21 per station. On an hourly basis, this was 3,117 hours and 22 minutes of programming. The range of programs per station went from two stations that reported they ran no children's programs up to 82 programs for one station.

Table 1 shows the average commercial levels for different sources of children's programs with the overall commercial time on an hourly basis at eight minutes and 38 seconds. In this report, all numbers will be given on an hourly basis for ease of comparison (i.e. non-program minutes in half hour programs are simply doubled. This may result in an overstatement of commercial loads as stations sometimes have higher loads in one half hour than in the adjacent next half hour.). Table 1 also reports the means for all non-network children's programs, all syndicated or barter children's programs (non-network excluding local and other), and all network children's programs.

Table 2 breaks the numbers down by various dayparts. In this sample, children's programs run during weekday afternoons contained approximately a half minute more

of commercials on an hourly basis than those aired during weekday mornings. Weekend children's programs had fewer minutes of commercials than did the weekday programs, especially non-network weekend programs.

Table 3 gives the commercialization levels for each day of the week. In this sample, the most commercialized day of the week was Wednesday, June 3 while Friday, December 19 was the lightest weekday. Sunday, August 16 proved to have the lowest levels of commercialization.

The market size breakdown showed that commercial levels were highest in the top 50 markets. Stations in smaller markets tended to run fewer commercial minutes, especially in non-network programs. A one way analysis of variance was performed on the non-network data and yielded a very significant F ratio of 43.65 ($p < .001$). Scheffe post-hoc comparisons of the group means showed that the smallest markets (101+) ran significantly fewer minutes of commercials per hour in non-network programming than did the other market group. Stations in markets 51-100 also showed a statistically significant difference with lower commercial loads than larger market stations.

In Table 5, the percentage of programs with various amounts of commercial minutes per hour is given. Over two-thirds of all children's programs had fewer than ten minutes of commercials on an hourly basis. Table 6 re-examines the data by market size.

Table 7 reports the commercialization levels on a station basis, rather than on a program basis. This table shows, for example, that 67.7% of the stations in the survey ran fewer than ten percent of their children's programs with more than eleven minutes of commercials on an hourly basis.

Finally, Table 8 reports the amount of total non-program material in children's programs on an hourly basis, using many of the same breakdowns as shown in previous tables.

Conclusions

As with any cross-sectional survey, this one provides a snapshot of a situation. In this case, we gain an accurate view of commercialization levels of children's television programs during the 1986-87 television season. For non-network programs, commercialization levels are higher in the top 50 markets than in smaller ones. Many stations run low commercial loads in all or nearly all of their children's programming while a few run larger amounts. Meanwhile, non-program material levels, at least on weekdays, are nearly constant, varying by only a few seconds across the week.

NAB CHILDREN'S TELEVISION SURVEY INSTRUCTION SHEET

Thank you for taking the time to fill out the questionnaire. Your answers are very important to NAB.

To complete this questionnaire, you will need to pull the program logs or equivalent information for a composite week of the 1986-87 television season. The dates needed are:

Monday, September 22, 1986
Tuesday, February 17, 1987
Wednesday, June 3, 1987
Thursday, November 6, 1986
Friday, December 19, 1986
Saturday, May 2, 1987
Sunday, August 16, 1987

If your station was not on the air during any of these dates or some unusual programming occurred, please call Ed Cohen at (202) 429-5381 for alternate dates.

You will need to find all the children's programming your station ran. If you are in doubt as to whether a program is truly for children or not, the FCC has defined children's programming as that **"originally produced and broadcast primarily for a child audience twelve years of age or under."** If you are still in doubt, include the program in the questionnaire.

There are two parts to this questionnaire. First, use the sheet with all the columns to list out various information. If you need more space, feel free to make copies. Here are the instructions:

Program Title - the name of the program

Date Aired - the calendar date on which the program ran

Start Time and End Time - Use the "clock" hour. For example, if a program started at 4:00 p.m. and ended at 4:29 p.m., list 4:00 p.m. as the "start time" and 4:30 p.m. as the "end time."

Source - Please use the following codes: N - Network, S - Syndicated, B-Barter, L - Local, O - Other.

Minutes CM- the minutes and seconds of commercials that ran in and around the program. **BE SURE TO INCLUDE ADJACENCIES.** For example, if a program ended at 4:29 p.m. and one minute of commercials ran between 4:29 p.m. and 4:30 p.m., be sure to include that one minute in the 4:00 p.m. to 4:30 p.m. half-hour.

Minutes Promos-the minutes and seconds of promotional announcements that ran in and around the program. **BE SURE TO INCLUDE ADJACENCIES.**

Minutes PSAs-the minutes and seconds of public service announcements that ran in and around the program. **BE SURE TO INCLUDE ADJACENCIES.**

Minutes other non-program material-the minutes and seconds of other non-program material that is not part of any of the previous categories (e.g. station IDs, etc.).

(over)

NOTE TO NETWORK AFFILIATES: You do not need to list the network non-program material minutes in network programs. NAB has obtained this information from the networks. List only non-program material that originated at your station.

The second part of the questionnaire requests a description of each program. Simply list the title of the program and a short description next to it.

When you are finished, fold the questionnaire sheets, place them in the postpaid reply envelope, and drop it in the mail.

If you have any questions, please call Ed Cohen, Manager of Audience Measurement and Policy Research, NAB Research and Planning Department, at (202) 429-5381 between 9 a.m. and 5 p.m. EST.

Thank you for your help.

NAB Children's Television Survey

Call Letters _____ Market Size _____

Program Title	Date Aired	Start Time	End Time	Source	Minutes CM	Minutes Promos	Minutes PSAs	Minutes Other Non-Program Matter
		:	:		:	:	:	:
		:	:		:	:	:	:
		:	:		:	:	:	:
		:	:		:	:	:	:
		:	:		:	:	:	:
		:	:		:	:	:	:
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		:	:		:	:	:	:
		:	:		:	:	:	:

Notes: Source: N-Network S-Syndication B-Barter L-Local O-Other CM-Commercial Matter
Other Non Program Matter -- Material that is not CM, Promo, or part of the program (e.g. station IDs)

NAB Children's Television Survey

Program Title	Program Description

NATIONAL ASSOCIATION OF BROADCASTERS
CHILDREN'S TELEVISION COMMERCIALIZATION SURVEY
FEBRUARY, 1988

Table 1

Overall Commercialization Levels of Children's Programming
on a Minutes-Per-Hour Basis

Type of Programming	Minutes	N
All Children's Programming	8:38	5635
All Non-Network Children's	8:29	4380
All Network Children's	9:10*	1255
All Syndicated/Barter	8:43	4200

*Amount of network CM has changed since 5/2/87 as ABC and CBS have each added one minute of available commercial time to their Saturday morning inventory. To adjust the figures, add approximately 40 seconds (not all time may be sold and not all programs will be carried on all stations).

NATIONAL ASSOCIATION OF BROADCASTERS
CHILDREN'S TELEVISION COMMERCIALIZATION SURVEY
FEBRUARY, 1988

Table 2

Children's Television Commercialization Levels
On a Minutes-Per-Hour Basis

By Dayparts

Type of Programming	All Children's	All Non-Network Children's	All Network Children's
Weekday Mornings	8:33 (1658)	8:33 (1658)	--
Weekday Afternoons/Evenings	9:14 (2040)	9:15 (2025)	8:12 (15*)
All Weekdays	8:56 (3698)	8:56 (3683)	7:31 (15*)
Weekends	8:05 (1937)	6:07 (697)	9:11 (1240)

*NBC ran "Babes In Toyland" on Friday, December 19, 1986. Many affiliates responding to the questionnaire did not realize this program should have been classified as a children's program. This should have no adverse effect on the numbers given above.

NATIONAL ASSOCIATION OF BROADCASTERS
CHILDREN'S TELEVISION COMMERCIALIZATION SURVEY
FEBRUARY, 1988

Table 3

Children's Television Commercialization Levels
By Day of Week
On a Minutes Per Hour Basis

Type of Programming	All Children's	All Non-Network Children's	All Network Children's
Monday, September 22, 1986	8:45 (735*)	8:45	--
Tuesday, February 17, 1987	8:40 (745*)	8:40	--
Wednesday, June 3, 1987	9:36 (673*)	9:36	--
Thursday, November 6, 1986	9:16 (754*)	9:16	--
Friday, December 19, 1986	8:30 (786)	8:31 (771)	8:12 (15**)
Saturday, May 2, 1987	8:12 (1646)	5:29 (459)	9:15 (1187)
Sunday, August 16, 1987	7:19 (291)	7:14 (243)	7:44 (48***)

*Only non-network children's programs aired on Monday through Thursday.

**NBC ran "Babes in Toyland" on Friday, December 22, 1986. Many affiliates responding to the questionnaire did not realize this program should have been classified as a children's program. This should have no adverse effect on the numbers given above.

***ABC's "Disney Sunday Movie" and NBC's "Our House" were considered to be children's programs by the respective networks. Many affiliates were not aware of this and did not include the programs in their listings. This should have no adverse effect on the numbers given above.

NATIONAL ASSOCIATION OF BROADCASTERS
CHILDREN'S TELEVISION COMMERCIALIZATION SURVEY
FEBRUARY, 1988

Table 4

Children's Television Commercialization Levels
By Market Size
On a Per-Hour Basis

Type of Programming	All Children's	All Non-Network Children's	All Network Children's
Markets 1-20	9:04 (1165)	9:03 (1030)	9:05 (135)
Markets 21-50	9:08 (1332)	9:05 (1108)	9:25 (224)
Markets 51-100	8:34 (1726)	8:22 (1325)	9:14 (401)
Markets 101+	7:54 (1412)	7:18 (917)	9:01 (495)

NATIONAL ASSOCIATION OF BROADCASTERS
CHILDREN'S TELEVISION COMMERCIALIZATION SURVEY
FEBRUARY, 1988

Table 5

Percentage Of Children's Programs At Or Below
Various Commercialization Levels
On A Per-Hour Basis

Minutes	All Programs	All Non-Network	All Network
7 or Fewer	28.7%	36.1%	3.1%
8 or Fewer	39.7	45.4	17.7
9 or Fewer	54.8	53.0	61.1
10 or Fewer	69.1	62.6	92.2
11 or Fewer	78.2	72.0	100.0
12 or Fewer	87.2	83.6	100.0
13 or Fewer	94.1	92.5	100.0
14 or Fewer	97.9	97.4	100.0
15 or Fewer	99.6	99.5	100.0

NATIONAL ASSOCIATION OF BROADCASTERS
CHILDREN'S TELEVISION COMMERCIALIZATION SURVEY
FEBRUARY, 1988

Table 6

Percentage of Children's Programs at or Below
Various Commercialization Levels by Market Size
On a Per-Hour Basis

Markets 1-20

Minutes	All Programs	All Non-Network	All Network
7 or Fewer	25.3%	28.3	3.0%
8 or Fewer	34.9	37.1	18.5
9 or Fewer	47.6	45.0	66.7
10 or Fewer	59.0	54.3	94.8
11 or Fewer	71.2	67.5	100.0
12 or Fewer	82.8	80.6	100.0
13 or Fewer	92.4	91.4	100.0
14 or Fewer	97.4	97.1	100.0
15 or Fewer	99.9	99.9	100.0

Markets 21-50

Minutes	All Programs	All Non-Network	All Network
7 or Fewer	25.5%	30.1%	2.7%
8 or Fewer	33.2	37.7	10.7
9 or Fewer	45.4	44.1	51.8
10 or Fewer	60.4	54.5	89.3
11 or Fewer	69.7	63.6	100.0
12 or Fewer	80.0	75.9	100.0
13 or Fewer	92.2	90.6	100.0
14 or Fewer	97.3	96.8	100.0
15 or Fewer	99.4	99.3	100.0

Table 6 Cont.

Markets 51-100

Minutes	All Programs	All Non-Network	All Network
7 or Fewer	29.7%	37.9%	2.7%
8 or Fewer	39.7	47.4	14.2
9 or Fewer	55.8	54.3	60.6
10 or Fewer	69.5	62.6	92.3
11 or Fewer	78.7	72.2	100.0
12 or Fewer	89.5	86.3	100.0
13 or Fewer	94.5	92.8	100.0
14 or Fewer	98.0	97.4	100.0
15 or Fewer	99.4	99.2	100.0

Markets 101+

Minutes	All Programs	All Non-Network	All Network
7 or Fewer	33.4%	49.4%	3.6%
8 or Fewer	48.0	61.3	23.4
9 or Fewer	68.6	70.7	64.6
10 or Fewer	85.5	81.6	92.7
11 or Fewer	91.5	86.9	100.0
12 or Fewer	95.0	92.3	100.0
13 or Fewer	97.0	95.4	100.0
14 or Fewer	99.0	98.5	100.0
15 or Fewer	99.8	99.7	100.0

NATIONAL ASSOCIATION OF BROADCASTERS
CHILDREN'S TELEVISION COMMERCIALIZATION SURVEY
FEBRUARY, 1988

Table 7

Percentage Of Stations Running Children's Programs
With Over 11, 12, and 13 Minutes of Commercials Per Hour
Less Than Ten Percent Of The Time

	11 Minutes	12 Minutes	13 Minutes
All Stations	67.7%	76.2%	88.8%
Markets 1-20	60.9	71.7	89.1
Markets 21-50	64.8	70.4	81.5
Markets 51-100	66.7	73.1	87.2
Markets 101+	74.4	85.4	95.2

Percentage Of Stations Running Children's Programs
With Over 11, 12, and 13 Minutes of Commercials Per Hour
Less Than Twenty Percent Of The Time

	11 Minutes	12 Minutes	13 Minutes
All Stations	78.1%	87.7%	93.1%
Markets 1-20	69.6	85.2	93.5
Markets 21-50	72.2	81.5	88.9
Markets 51-100	73.1	88.5	92.3
Markets 101+	91.5	93.9	96.4

Percentage Of Stations Running Children's Programs
With Over 11, 12, and 13 Minutes of Commercials Per Hour
Less Than Thirty Percent Of The Time

	11 Minutes	12 Minutes	13 Minutes
All Stations	85.0%	92.3%	97.7%
Markets 1-20	73.9	89.1	95.7
Markets 21-50	77.8	85.2	98.1
Markets 51-100	84.5	93.4	97.4
Markets 101+	96.4	97.6	98.8

NATIONAL ASSOCIATION OF BROADCASTERS
CHILDREN'S TELEVISION COMMERCIALIZATION SURVEY
FEBRUARY, 1988

Table 8

Total Non-Program Material In Children's Programming
On a Minutes-Per-Hour Basis

Type of Programming	All Children's	All Non-Network Children's	All Network Children's	All Syndicated/ Barter
Total	13:06 (5635)	13:40 (4380)	11:05 (1255)	13:53 (4200)
By Daypart				
Weekday Mornings	14:04 (1658)	14:04 (1658)	--	--
Weekday Afternoons/ Evenings	13:47 (2040)	13:49 (2025)	9:10 (15)	
Weekdays	13:54 (3698)	13:56 (3683)	9:10 (15)	
Weekends	11:32 (1937)	12:16 (697)	11:07 (1240)	
By Day of Week				
Monday, 9/22/86	13:55 (735)	--	--	
Tuesday, 2/17/87	13:55 (745)	--	--	
Wednesday, 6/3/87	13:58 (673)	--	--	
Thursday, 11/6/86	13:59 (754)	--	--	
Friday, 12/19/86	13:48 (786)	13:52 (771)	9:58 (15)	
Saturday, 5/2/87	11:25 (1646)	12:02 (459)	11:10 (1187)	
Sunday 8/16/87	12:12 (291)	12:40 (243)	9:51 (48)	

Table 8 Continued

By Market Size

Type of Programming	All Children's	All Non-Network Children's	All Network Children's
Markets 1-20	13:38 (1165)	13:58 (1030)	10:56 (135)
Markets 21-50	13:27 (1332)	13:53 (1108)	11:19 (224)
Markets 51-100	12:52 (1726)	13:23 (1325)	11:09 (401)
Markets 101+	12:36 (1412)	13:28 (917)	10:59 (495)